

Instructions for e-IDR

The Immediate Disclosure Reporting (e-IDR) Electronic Filing Program has been developed to provide more convenient filing options to Committees registered with the Bureau of Elections. In addition, the program provides faster and more accurate information to the public. The instructions below are provided to assist you with completing your online filing. These instructions can be used in conjunction with the instructional aids in the application. These instructional aids include:

- **Help Function:** As you go through the program/system/forms, you will find a "Help Button" to provide more information concerning using the application or how to complete the form based on the legal requirements.
- **Mouse-Overs:** Holding or hovering your mouse over long description fields opens an expansion of the field.
- **Instructions on the pages:** Throughout the application, the wording has been carefully designed to assist you in completing the forms.

Recommended Browsers and JAVA Script Enabled

The following are the recommended browsers for using the application. All users must have JAVA Script enabled on their chosen browser.

1. Internet Explorer 6.x or higher
2. Firefox 1.0.6 or higher
3. Netscape 7.x or higher

GETTING STARTED

To get started, from the Elections in Michigan Page, click on:

1. Campaign Finance Disclosure Page;
2. Electronic Filing and MERTS and
3. Immediate Disclosure Reports (e-IDR)

The first page you will see is the Committee Login page. See illustration and instructions below to complete the form.



* Indicates required fields

LOGIN FOR E-FILED CAMPAIGN FINANCE REPORTS	
Committee ID# :	<input type="text"/>
Password :	<input type="password"/> Get/Reset Your Password
Email :	<input type="text"/>
Re-enter Email :	<input type="text"/>
<input type="button" value="Login"/> <input type="button" value="Clear All"/>	

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Log-in ID#: Enter the Committee identification number assigned to you by the Bureau of Elections. You do not need to enter the dash and the digit following the dash.

If you do not have your identification number, contact the Bureau of Elections at 517-373-2540 for assistance.

Password: Enter the password assigned to the committee exactly as it was provided to you. If you need to request a password, click the “[*Get/Reset Your Password](#)” button to the right.

The following page will appear.



Welcome to mertsplus.com!

Welcome to the Home Page of the Michigan Electronic Reporting and Tracking System, otherwise known as MERTS. Please consider this site your "web portal" for all things MERTS Plus.

Get a password for uploading MERTS Plus filings

Read the [Password FAQ](#) for more information about electronic filing passwords.

**Welcome to Michigan Campaign Finance
Electronic Filing Upload Password Assignment
Online!**

➤ **Please Note:** You should not have to use this form to get a password if you have successfully completed the Online Merts Quiz at the end of online training! Please be patient and check your email inbox before trying this form.

Upon completion of this form, a new Electronic Filing Upload password will be issued to your committee, and emailed to the address you have given. Any previous electronic filing passwords issued to your committee treasurer will no longer work.
If you lose or forget this password, you must come back to this page to issue a new one.

Note: This page requires [Internet Explorer 5.5+](#) or [Netscape 6.1+](#)

Committee ID#:	<input type="text"/>	
Treasurer Last Name:	<input type="text"/>	
Email Address: (Twice for confirmation)	Your email address: <input type="text"/>	
	Please repeat your email address: <input type="text"/>	
Please <i>confirm</i> the above selections, then press Assign It	<input type="button" value="Assign It"/> <input type="button" value="Clear"/>	

Email: Enter the email address where you should receive confirmation of your filing and a copy of the filing submitted to the Bureau of Elections.

Re-enter Email: Re-enter the email address. Both Email fields must match exactly for you to continue.

Click the “Assign It” button to complete the password request. An email will be sent immediately to the email address provided. Note: You will need to close or minimize the application to access your email and then return to the e-IDR program.

Click the “Clear” Button only if you need to clear all of the fields.

Click the “Login” Button to continue into the e-IDR program.

If any of the information in the Login page is incorrect, you will be given an opportunity to correct the information. A window will appear that explains the error. You can then correct the information.

SELECT THE REPORT TO BE FILED

After successfully entering the login information, you will proceed to a page to select the type of report to be filed.



The screenshot shows the Michigan Department of State Campaign Finance Electronic Filing interface. At the top is a banner for the Department of State, Terri Lynn Land, Secretary of State, with the Michigan.gov logo. Below the banner is a navigation bar with links: Michigan.gov Home, SOS Home, Elections in Michigan Home, and Contact SOS. The main heading is "CAMPAIGN FINANCE Electronic Filing" with a map of Michigan. The form displays the Committee ID# 511586 and Committee Name E-IDR PAC TEST COMMITTEE. There are two main sections: "FILE NEW REPORT" and "AMEND PREVIOUSLY FILED FINANCE REPORT". The "FILE NEW REPORT" section has a "Report Date" field with a date picker (mm/dd/yyyy), a "Report Type" dropdown menu (currently showing "-Select One-"), and a "Create New Report" button. The "AMEND PREVIOUSLY FILED FINANCE REPORT" section has a table with the following rows:

Financial Report
INDEPENDENT EXPENDITURE REPORT 2005-12-10
LATE CONTRIBUTION REPORT 2005-12-09
INDEPENDENT EXPENDITURE REPORT 2005-12-08
LATE CONTRIBUTION REPORT 2005-12-07
INDEPENDENT EXPENDITURE REPORT 2005-12-03
LATE CONTRIBUTION REPORT 2005-12-02

At the bottom of the page is a footer with links: Michigan.gov Home, SOS Home, Site Map, FAQ, Online Services, Forms & Resources, Contact SOS, State Web Sites, Privacy Policy, Link Policy, Accessibility Policy, Security Policy, Michigan News, and Michigan.gov Survey. The copyright notice is "Copyright © 2001-2006 State of Michigan".

The Committee ID#: Displayed for your information and confirmation.

Committee Name: Displayed for your information and confirmation.

Abort the session, by closing the browser, and contact the Bureau of Elections at 517-373-2540 if you believe you accessed the incorrect filer information.

To file an **new** report:

Report Date: Enter the date that the contributions or expenditures were received or made by the committee filing the report. The committee receives a contribution as soon as the committee treasurer or an agent designated by the treasurer receives it.

Report Type: Select the proper report type.

Click the “Create New Report” button to proceed.

OR

To amend an **existing** report:

Select the report from the list to proceed.

ENTER THE REPORT INFORMATION

1. Late Contribution Report
2. Special Election Independent Expenditure Report
3. 24-Hour Expenditure Report
4. 24-Hour Contribution Report

1. Late Contribution Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.



LATE CONTRIBUTION REPORT

1. Your Committee ID#	511585
2. Your Committee Name	E-IDR CAUCUS TEST COMMITTEE
3. Date of Transaction	12/01/2005 {mm/dd/yyyy}

(Only one Date per Session)

- Late Contribution Reports are required when a committee receives a single contribution of \$200.00 or more between the 15th day and 3rd day before an election that the committee participates in. See Appendix F of any Campaign Finance Manual.
- Contributions are anything of monetary value including contributions of money, in-kind and loans to the committee.
- Late Contribution Reports are not waived by the Reporting Waiver.
- Late Contribution Reports that are filed late result in the committee receiving a late filing fee. The maximum fee is \$2,000.00 per report.
- File the report within 48 hours of the receipt of the contribution.
- The Late Contribution must also be reported on the next Campaign Statement owed by the committee.
- If your committee is required to file campaign statements electronically, the Late Contribution Report must also be filed electronically.

ITEMIZED CONTRIBUTIONS

[Add More Contributions](#)

Contribution #1 ☐ If checked, this contribution will be removed from the report when Submit button is pressed

Contributors Last Name or Organization	First Name	Occupation	Employer
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contributors Address	Employer/Business Address		
<input type="text"/>	<input type="text"/>		
<input type="text"/>	<input type="text"/>		
City	State	City	State
<input type="text"/>	Michigan	<input type="text"/>	Michigan
Zip Code		Zip Code	Amount
<input type="text"/>		<input type="text"/>	<input type="text"/>

[Add More Contributions](#)

[Submit](#) [Help](#)

Server Last Accessed on: Tue Jun 13 2006 16:02:52 GMT-0400 (Eastern Standard Time)
Your server session will timeout in : 30 minutes from last server access time.
[Keep your web session alive for another 1 Hour.](#)

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Entering Fields:

Contributors Last Name or Organization: Enter the Last Name of the contributor or the Organization name if the contributor is not an individual.

First Name: If the contributor is an individual, enter their First Name.

Contributors Address: Enter the contributor's address.

City: Enter the contributor's city.

State: Enter the contributor's state.

Zip Code: Enter the contributor's zipcode.

Occupation: If the contributor is an individual, enter the occupation of the contributor. Note Self Employed is not an occupation.

Employer: If the contributor is an individual, enter the employer of the contributor.

Employer/Business Address: If the contributor is an individual, enter the address of the contributor's employer or business address.

City: If the contributor is an individual, enter the city of the contributor's employer or business address.

State: If the contributor is an individual, enter the state of the contributor's employer or business address.

Zip Code: If the contributor is an individual, enter the address of the zip code employer or business address.

Amount: Enter the Amount of the Contribution

Check Boxes or Buttons:

Mark the **"If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the **"Add More Contributions"** to continue adding transactions into the form for the date listed in Item #3.

Click the **"Help"** Button for on-screen help features.

Click the **"Submit"** Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the **"Keep your web session alive for another 1 Hour"** if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

2. Special Election Independent Expenditure Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.



INDEPENDENT EXPENDITURE REPORT

1. Your Committee ID#	511585			
2. Your Committee Name	E-IDR CAUCUS TEST COMMITTEE			
3. Date of Transaction	02/02/2006 {mm/dd/yyyy}			
(Only one Date per Session)				
<ul style="list-style-type: none">Special Election Independent Expenditure Reports are required when a committee registered on the state-level makes an "independent expenditure" to support or oppose a candidate or ballot question within 45 calendar days before a special election in which the candidate or ballot question is involved.An expenditure is "independent" if it is not made at the direction of, or under the control of, another person and if the expenditure is not a contribution to a committee.Special Election Independent Expenditure Reports are not waived by the Reporting Waiver.Special Election Independent Expenditure Reports filed late will result in the committee receiving a late filing fee as explained in the committee manual.If your committee is required to file Triannual Campaign Statements electronically, the Special Election Independent Expenditure Report must also be filed electronically.The information reported in the Special Election Independent Expenditure Report must also be reported on the next Triannual Campaign Statement owed by the committee.If your committee is required to file campaign statements electronically, the Special Election Independent Expenditure Report must also be filed electronically.				
ITEMIZED EXPENDITURES				
Add More Expenditures				
Expenditure #1 <input type="checkbox"/> If checked, this expenditure will be removed from the report when Submit button is pressed				
Recipients Last Name or Committee	First Name	Candidate Last Name (if applicable)	First Name	
Recipients Address		Office/District Sought	County of Residence	
City	State Michigan	Ballot Question		
Zip Code		Exp. Type Independent	Supp/Opp Oppose	Amount
Add More Expenditures				
Submit		Help		

Server Last Accessed on: Tue Jun 13 2006 16:04:18 GMT-0400 (Eastern Standard Time)
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Entering Fields:

Recipients Last Name or Organization: Enter the Last Name of the recipient or the Organization name if the recipient is not an individual.

First Name: If the recipient is an individual, enter their First Name.

Recipients Address: Enter the recipient's address.

City: Enter the recipient's city.

State: Enter the recipient's state.

Zip Code: Enter the recipient's zip code.

Candidate Last Name: If the recipient is a candidate committee, enter the candidate's last name.

First Name: If the recipient is a candidate committee, enter the candidate's first name.

Office/District Sought: If the recipient is a candidate committee, enter the candidate's office sought and district information; for example State Representative, 1st District.

County of Residence: If the recipient is a candidate committee, enter the candidate's county of residence.

Ballot Question: If the recipient is a ballot question committee, enter the name of the proposal

Exp. Type: Defaults to Independent

Supp/Opp: Defaults to Support. Select Oppose if the expenditures is to oppose the recipient committee.

Amount: Enter the Amount of the Expenditure

Check Boxes or Buttons:

Mark the “**If, checked this contribution will be removed from the report when Submit button is pressed**” to remove a transaction.

Click the “**Add More Expenditures**” to continue adding transactions into the form for the date listed in Item #3.

Click the “**Help**” Button for on-screen help features.

Click the “**Submit**” Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the “**Keep your web session alive for another 1 Hour**” if your session will take more than 30 minutes. Note if the session is lost before you complete the “submit” process, the data entered will be lost.

3. 24-Hour Expenditure Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.



24 HOUR EXPENDITURE REPORT

1. Your Committee ID#	511585		
2. Your Committee Name	E-IDR CAUCUS TEST COMMITTEE		
3. Date of Transaction	05/01/2006 {mm/dd/yyyy}		
(Only one Date per Session)			
<ul style="list-style-type: none">• 24 Hour Expenditure Reports are required when a caucus committee makes a single expenditure of more than \$1000 from the 14th day preceding an election to the day after the election.• Expenditure is defined in Section 6 of the Campaign Finance Act.• 24 Hour Expenditure Reports are not waived by the Reporting Waiver.• 24 Hour Expenditure Reports that are filed late result in the committee receiving a late filing fee. The maximum fee is \$1000 per report.• 24 Hour Expenditure Reports must be filed electronically within 24 hours of making the expenditure.• Expenditures reported on the 24 Hour Expenditure Report must also be reported on the next Campaign Statement owed by the committee.• If your committee is required to file campaign statements electronically, the 24 Hour Expenditure Report must also be filed electronically.			
ITEMIZED EXPENDITURES			
Add More Expenditures			
Expenditure #1 <input type="checkbox"/> If checked, this expenditure will be removed from the report when Submit button is pressed			
Recipients Last Name or Committee	First Name	Candidate Last Name (if applicable)	First Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Recipients Address		Office/District Sought	County of Residence
<input type="text"/>		<input type="text"/>	<input type="text"/>
City		Ballot Question	
<input type="text"/>	State	<input type="text"/>	
<input type="text"/>	Michigan <input type="button" value="v"/>	Exp. Type	Supp/Opp
Zip Code		Direct <input type="button" value="v"/>	Support <input type="button" value="v"/>
<input type="text"/>			Amount
			<input type="text"/>
Add More Expenditures			

[Submit](#) [Help](#)

Server Last Accessed on Mon Jul 03 2006 09:41:29 GMT-0400 (Eastern Standard Time)

Your server session will timeout in : 30 minutes from last server access time.

[Keep your web session alive for another 1 Hour.](#)

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Entering Fields:

Recipients Last Name or Organization: Enter the Last Name of the recipient or the Organization name if the recipient is not an individual.

First Name: If the recipient is an individual, enter their First Name.

Recipients Address: Enter the recipient's address.

City: Enter the recipient's city.

State: Enter the recipient's state.

Zip Code: Enter the recipient's zip code.

Candidate Last Name: If the recipient is a candidate committee, enter the candidate's last name.

First Name: If the recipient is a candidate committee, enter the candidate's first name.

Office/District Sought: If the recipient is a candidate committee, enter the candidate's office sought and district information; for example State Representative, 1st District.

County of Residence: If the recipient is a candidate committee, enter the candidate's county of residence.

Ballot Question: If the recipient is a ballot question committee, enter the name of the proposal

Exp. Type: Defaults to Independent

Supp/Opp: Defaults to Support. Select Oppose if the expenditures is to oppose the recipient committee.

Amount: Enter the Amount of the Expenditure

Check Boxes or Buttons:

Mark the **"If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the **"Add More Expenditures"** to continue adding transactions into the form for the date listed in Item #3.

Click the **"Help"** Button for on-screen help features.

Click the **"Submit"** Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the **"Keep your web session alive for another 1 Hour"** if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

4. 24-Hour Contribution Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.

The screenshot shows the Michigan Department of State website header with the Secretary of State Terri Lynn Land. Below is the Campaign Finance Electronic Filing logo. The main title is "24 HOUR CONTRIBUTION REPORT". The form contains pre-filled information: 1. Your Committee ID# 511585, 2. Your Committee Name E-IDR CAUCUS TEST COMMITTEE, and 3. Date of Transaction 01/01/2006. A list of instructions for 24-hour contribution reports is provided. The "ITEMIZED CONTRIBUTIONS" section has a "Contribution #1" form with fields for Contributor's Last Name or Organization, First Name, Occupation, Employer, Contributors Address, Employer/Business Address, City, State (Michigan), Zip Code, and Amount. There are "Add More Contributions", "Submit", and "Help" buttons. At the bottom, server access information and various policy links are listed.

1. Your Committee ID# 511585
2. Your Committee Name E-IDR CAUCUS TEST COMMITTEE
3. Date of Transaction 01/01/2006 {mm/dd/yyyy}

(Only one Date per Session)

- 24 Hour Contribution Reports are required when a caucus committee receives a single contribution of more than \$1000 from the 14th day preceding an election to the day after an election.
- Contributions are anything of monetary value including contributions of money, in-kind and loans to the committee.
- 24 Hour Contribution Reports are not waived by the Reporting Waiver.
- 24 Hour Contribution Reports that are filed late result in the committee receiving a late filing fee. The maximum fee is \$1000 per report.
- 24 Hour Contribution Reports must be filed electronically.
- Contributions reported on the 24 Hour Contribution Report must also be reported on the next Campaign Statement owed by the committee.
- If your committee is required to file campaign statements electronically, the 24 Hour Contribution Report must also be filed electronically.

ITEMIZED CONTRIBUTIONS

Add More Contributions

Contribution #1 ☐ If checked, this contribution will be removed from the report when Submit button is pressed

Contributors Last Name or Organization	First Name	Occupation	Employer
Contributors Address		Employer/Business Address	
City	State Michigan	City	State Michigan
Zip Code		Zip Code	Amount

Add More Contributions

Submit Help

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Entering Fields:

Contributors Last Name or Organization: Enter the Last Name of the contributor or the Organization name if the contributor is not an individual.

First Name: If the contributor is an individual, enter their First Name.

Contributors Address: Enter the contributor's address.

City: Enter the contributor's city.

State: Enter the contributor's state.

Zip Code: Enter the contributor's zipcode.

Occupation: If the contributor is an individual, enter the occupation of the contributor. Note Self Employed is not an occupation.

Employer: If the contributor is an individual, enter the employer of the contributor.

Employer/Business Address: If the contributor is an individual, enter the address of the contributor's employer or business address.

City: If the contributor is an individual, enter the city of the contributor's employer or business address.

State: If the contributor is an individual, enter the state of the contributor's employer or business address.

Zip Code: If the contributor is an individual, enter the address of the zip code employer or business address.

Amount: Enter the Amount of the Contribution

Check Boxes or Buttons:

Mark the **“If, checked this contribution will be removed from the report when Submit button is pressed”** to remove a transaction.

Click the **“Add More Contributions”** to continue adding transactions into the form for the date listed in Item #3.

Click the **“Help”** Button for on-screen help features.

Click the **“Submit”** Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the **“Keep your web session alive for another 1 Hour”** if your session will take more than 30 minutes. Note if the session is lost before you complete the “submit” process, the data entered will be lost.

RE-ENTER PASSWORD FOR SECURITY

Password: Enter the password assigned to the registrant exactly as it was provided to you.

To go back to correct or double-check the form, click the **“Return To Form”** Button

To submit the report, click the **“Submit Report”** Button.

Department of State
Terri Lynn Land, Secretary of State

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CAMPAIGN FINANCE
Electronic Filing

SUBMIT LATE CONTRIBUTION REPORT: RE-ENTER PASSWORD FOR SECURITY

Committee Name :	E-IDR CAUCUS TEST COMMITTEE
Committee ID# :	511585
Password :	<input type="password"/>

[Submit Report](#) [Return To Form](#)

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An online screen will appear to inform you that your filing has been received. The document sequence number is also displayed.



Your filing has been successfully submitted to Bureau Of Elections.
Your confirmation document sequence number is **228699**.

A confirmation email has been sent to the box of **Email Address Displayed Here**

Thanks for using the web-based e-IDR filing system.

[Return to e-IDR Login Page](#)

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An email message with a copy of the Report attached will be sent to the email address used in the Login process.